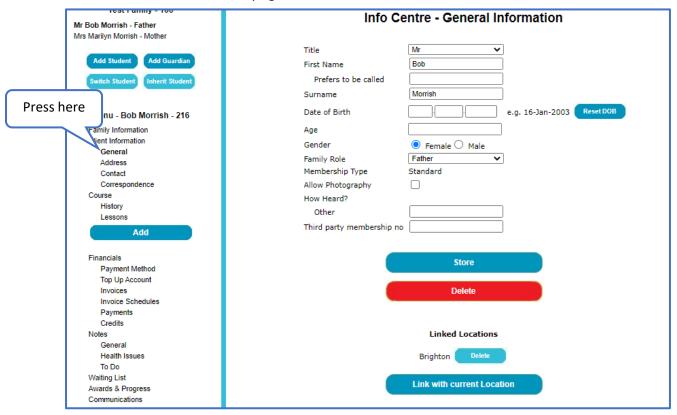


Client Information

This document will cover the **Client Information** section of the **CDS**, which includes **General**, **Address**, **Contact** and **Correspondence**.

General Information

The **General Information** page of the CDS includes the basic information about a client.



When first adding a client onto SwimSoft you are asked to input the required information to create the CDS. This page includes the client's **Title**, **First Name**, any other name they **prefer to be called** (optional), **Surname**, **Date of Birth** (optional), **Gender**, **Family Role**, **Photography Permissions**, a box for **Other Information** and a box for a **Third-Party Membership No** (Leisure centre membership number etc). You can make changes to this information at any time and then press the **Store** button to save.

Address Information

Having a client's address in SwimSoft makes it easy to differentiate between families with the same name, they were also used previously when invoices and other communications were sent via post.

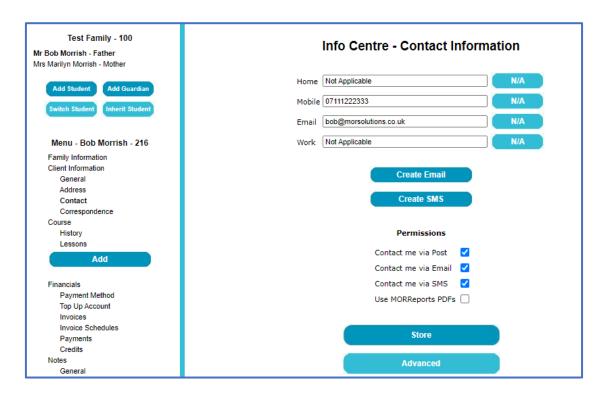
It is important to ensure that each client only has one address. To make changes to an existing address, press the **Edit** button first.





Contact Information

Within SwimSoft it is imperative that we have at least one guardian's **Mobile** number and **Email**, this is so they can receive any important communications regarding the students. If it is an adult taking lessons, the same thing applies. There are other boxes on the Contact page for a **Home** number and a **Work** number, these aren't required in the system but can be helpful to have. If you do not have a piece of information, you can press the relevant **N/A** button, so this doesn't flag up on the **Student Health Check**.



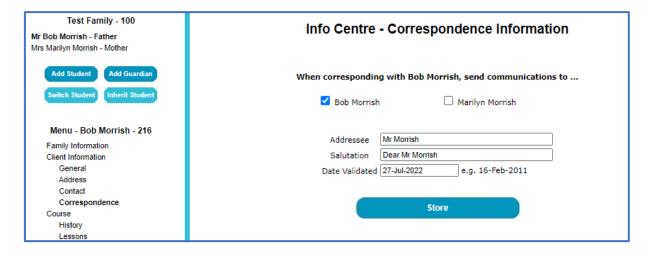
The permissions underneath reflect the ways you can contact the adult who has supplied contact details. For example, if you do not have a mobile number for them, you will not be able to contact them via SMS.



Correspondence

The **Correspondence** section allows you to define who you will contact regarding each student. If you are on an adult's CDS and have contact details for them, you would be corresponding with this adult about their own lessons.

SwimSoft does not hold contact details against children, therefore on a child's CDS, you will have to have an adult selected under the **Correspondence** section. You can select multiple adults to correspond with about an individual, just be aware that they will get one email every time you generate one for the student.



You also want to ensure that the **Salutation** is correct under the correspondence information. The salutation is what will be displayed on emails to the client and so it is important this is kept up-to-date and valid.